

## How to Plan and Run Meetings

The tools in this section will help you plan and run different types of meetings.

At your first meeting, it is important for all team members to agree in writing about the team leadership and practical details such as when, how frequently and where the group will meet and, most importantly, how the group will make decisions. This is often called a terms of reference. The following terms of reference template can be used to guide and document this discussion.

### Terms of Reference

#### Planning Team Name

#### Date

Indicate when the Terms of Reference was approved.

#### Goals

Describe the project team's primary [2-3] goals.

#### Objective statement

Describe the project team's primary [3-5] objectives (e.g. how will the team accomplish its goals).

#### Membership

Describe positions of members (not members' names), term of serving as a member (if applicable) and member selection process (if applicable).

#### Chair

Name of chosen chairperson and length of term for chair.

#### Meetings

Describe how often the project team will meet, when and where.

#### Minutes

Describe who will take notes, how they will be taken, reviewed, and shared and determine length of term for minute-taker.

#### Decision-Making

Describe the process by which decisions are made. See Tool I in Kitchener's Neighbourhood Action Plan toolkit for decision making tools.

*The Terms of Reference template was adapted in part from the Hamilton Neighbourhood Action Planning Toolkit, Tool D – Terms of Reference. View Hamilton's Toolkit at [bit.ly/2hRLt6H](http://bit.ly/2hRLt6H).*

## Meeting Checklist

The following items identify the types of things that should be considered when planning and running a meeting. All items may not be required, or possible, for every meeting. The host should consider the purpose of the meeting and the types of resources and supports that are available.

Item	Who	By When	Completed
<b>1. Organizing invitations</b>			
<ul style="list-style-type: none"> <li>• Invitation List (consider diversity of neighbourhood)</li> <li>• Invitation Message and Package               <ul style="list-style-type: none"> <li>▪ Agenda</li> <li>▪ Date of meeting</li> <li>▪ Time of meeting</li> <li>▪ Previous minutes</li> <li>▪ Map to location</li> <li>▪ How and when to RSVP</li> </ul> </li> </ul>			
<b>2. Where, when and how long to hold meetings</b>			
<ul style="list-style-type: none"> <li>• Where               <ul style="list-style-type: none"> <li>▪ Check out venue in person</li> </ul>               Consider               <ul style="list-style-type: none"> <li>▪ Size and space</li> <li>▪ Enough tables and chairs</li> <li>▪ Electrical outlets</li> <li>▪ Parking</li> <li>▪ Accessibility</li> <li>▪ Location in neighbourhood</li> <li>▪ Space for childcare</li> <li>▪ Access to washrooms</li> <li>▪ Audio/visuals like PowerPoint presentations (if needed)</li> </ul> </li> <li>• When               Consider               <ul style="list-style-type: none"> <li>▪ When people work</li> <li>▪ School hours</li> <li>▪ Time of year (seasonal activities, weather, holidays)</li> </ul> </li> <li>• How long is needed               Consider               <ul style="list-style-type: none"> <li>▪ Time to achieve purpose</li> <li>▪ Time that is good for residents</li> <li>▪ Distance people have to travel</li> <li>▪ Meal/Snack breaks</li> </ul> </li> </ul>			
<b>3. Equipment, meeting materials, refreshments</b>			
<ul style="list-style-type: none"> <li>• Equipment               <ul style="list-style-type: none"> <li>▪ Whiteboard or flipchart stands</li> <li>▪ Chairs and tables</li> </ul> </li> </ul>			

Item	Who	By When	Completed
<ul style="list-style-type: none"> <li>▪ Laptop, projector</li> <li>▪ Power cords</li> <li>• Meeting materials               <ul style="list-style-type: none"> <li>▪ Agenda and minutes</li> <li>▪ Sticky notes</li> <li>▪ Flipchart sheets</li> <li>▪ Whiteboard markers and eraser</li> <li>▪ Markers and pens</li> <li>▪ Masking tape, scissors</li> <li>▪ Instructions for any activities</li> <li>▪ Name tags or desk name plates</li> <li>▪ Sign in sheets with contact information</li> <li>▪ Direction sign on building guiding people to meeting</li> </ul> </li> <li>• Refreshments               <ul style="list-style-type: none"> <li>▪ Healthy and culturally appropriate</li> <li>▪ Caterer or restaurant booked</li> <li>▪ Beverages</li> <li>▪ Food appropriate to meeting time and length</li> <li>▪ Special dietary needs, culturally responsive</li> <li>▪ Plates, cutlery, serviettes, cups, table cloth</li> </ul> </li> </ul>			
<b>4. Agenda and meeting process</b>			
<ul style="list-style-type: none"> <li>• Purpose of meeting</li> <li>• Welcome/introductions</li> <li>• How long each agenda item will take</li> <li>• When/if to have breaks</li> <li>• Different learning styles</li> <li>• Interactive</li> </ul>			
<b>5. Evaluation of meeting</b>			
<ul style="list-style-type: none"> <li>• Feedback sheets prepared</li> <li>• Box for completed sheets</li> </ul>			

*The Meeting Checklist was borrowed from the Hamilton Neighbourhood Action Planning Toolkit, Tool C– Meeting Checklist. View Hamilton's Toolkit at [bit.ly/2hRLt6H](http://bit.ly/2hRLt6H).*

## 10 Tips for Effective Meetings

- Make sure you need to have a meeting
- Always have an agenda
- Have people show up on time
- Invite the right people
- Use email effectively
- Use meetings to argue
- Record your decisions
- Don't overuse PowerPoint presentations
- Get everyone talking
- End on time

*The 10 Tips for Effective Meetings were adapted from Kitchener's Volunteer Resources Training Resources for Effective Meetings.*

## Managing Effective Meetings

Practical tips for using everyone's time most effectively

### Consider the different types of meetings

- Impromptu chat on the street
- Kitchen table meetings
- Brainstorm meetings
- Meetings to seek input
- Presentations
- Annual meetings
- Family meetings
- Team meetings
- Community partner meetings

### What is the purpose of the meeting?

- To share information
- To exchange ideas, views, opinions and suggestions
- To brainstorm something
- To problem solve
- To reach a decision on something
- To create plans

Remember, the number one reason that meetings don't work is because there is no clear purpose. Write down your purpose and share it with everyone.

### **What to do before the meeting?**

- Logistics
- Purpose
- Agenda with objectives
- Participant roles
- Documents, readings, homework
- Reminders

### **What to do during the meeting?**

- Arrive early
- Start on time
- Introductions
- Meeting rules
- Follow agenda
- End on time

### **How do you make people want to be there?**

- Seek input
- Get feedback
- Engage in problem solving
- Make group decisions
- Include time for fun and social interaction

### **What is the process to encourage a discussion?**

- Presentation of new idea or item for discussion
- Questions and answers shared
- Discussion/debate
- Restate decision made or action to be taken
- Seek consensus or general agreement

## How to deal with challenging personalities?

Types of Personalities	
<b>"The Bully"</b>	<b>What to do:</b>
<ul style="list-style-type: none"> <li>• Grudge to bear</li> <li>• Angry about an issue</li> <li>• Dominate the meeting</li> <li>• Shouting down or intimidating other attendees</li> </ul>	<ul style="list-style-type: none"> <li>• Ground rules</li> <li>• Find out where the anger is coming from</li> <li>• Offer to speak to them in private</li> <li>• Limit the bully's air time</li> </ul>
<b>"The Expert"</b>	<b>What to do:</b>
<ul style="list-style-type: none"> <li>• Experts on an issue (or on all issues)</li> <li>• Think they know best</li> <li>• Talking at great length</li> <li>• Buzz words or jargon</li> <li>• Interrupting</li> </ul>	<ul style="list-style-type: none"> <li>• Set limits on speaking time</li> <li>• Acknowledge their contribution</li> <li>• Interrupt them tactfully</li> <li>• Avoid making eye contact</li> <li>• Direct questions to others</li> <li>• Tell them that the team needs to move on</li> <li>• Speak to them in private</li> </ul>
<b>"The Wet Blanket"</b>	<b>What to do:</b>
<ul style="list-style-type: none"> <li>• Devil's advocate</li> <li>• Argues the opposite</li> <li>• Gets over-heated</li> <li>• Distracts from the meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Ground rule-constructive comments</li> <li>• Respectfully acknowledge what they've said and move on</li> <li>• Bring in other participants' views</li> <li>• Take them aside</li> </ul>
<b>"The Silent Type"</b>	<b>What to do:</b>
<ul style="list-style-type: none"> <li>• Not contributing</li> <li>• Not engaged</li> <li>• Might feel intimidated</li> <li>• May need some encouragement to speak up</li> </ul>	<ul style="list-style-type: none"> <li>• Ask for anyone who hasn't had a chance to speak to give their views</li> <li>• Encourage any input they give</li> <li>• Ask for their expert opinion</li> <li>• Have them work on a project</li> </ul>

## How to end a meeting?

- Review action items and timelines
- Set date for next meeting
- Evaluation – briefly reflect on how the meeting went
- Say thank you

## What to do after a meeting?

- Communication reports (minutes)
- Emails
- Follow-up

*The Managing Effective Meetings tips were adapted from Kitchener's Volunteer Resources Training Resources for Effective Meetings power point presentation.*